

PX-9

DEPRECATED - this doc is being deprecated in lieu of regional snippets collections for now (e.g. North America Apps snippets etc.). We are going in this direction as a) this doc is now sparsely used b) we've gotten feedback that there are a LOT of snippets to contribute to so we are trying to streamline. If you have questions / concerns / suggestions, please reach out to skaram@google.com

READ ME BEFORE INPUTTING TO THIS DOC:

1. Apps BDs: please input your monthly partner snippets into this doc **by EOM**.
2. The audience for this doc is Play Apps BDs. **An executive summary view for XFN leaders (incl. Don, Sameer etc.) will be pulled from this doc by the Apps BD lead and sent the first week of the following month.** (it's a separate doc, execs do not have access to this doc).
3. **Please focus on meaningful partner updates and include LINKS to supporting data.** Good examples include business consultations of note with key takeaways or implementations (& links), trends shared by partners, new apps launching, platform or feature launches, execute summits & takeaways, best practices to share, etc. Bad examples include "Met with...(nothing of note, no link)"
4. **Comment freely but please be aware that this doc is not privileged.** For anything sensitive, please move to Chat / video call.
5. **Thank you for all sharing your great work!**

Play Apps BD Updates: Mar 2021

KEY UPDATES

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DEVELOPER SUCCESS

- [SEA] Following GC, Monetisation UXC and recommendations around Behavioral insights for Subscription Upsell, MuslimPro revamped the Android Paywall. After a successful test in Feb that showed +12% increase in Subscription rates the new paywall was rolled out globally in March (before/after Paywall design; A/B test results from the partner)
- [AU] SBS on Demand shared the roadmap for the Android App rebuild following Q4 GC/App UX sessions. Priorities for the next 6 months include implementing App bundle, pre-registration on Play to test the new App experience, increase Android ratings to peer averages, improve Android vitals, more Android Native implementation and parity with iOS
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PRODUCT SUCCESS

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MARKET TRENDS, EVENTS, ISSUES

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Play Apps BD Updates: Feb 2021

KEY UPDATES

- Organized a deep-dive Android Quality engagement for 9 Duolingo execs & SWEs in partnership with 20 Google Execs, PMs, SWEs from multiple Android teams to better understand the developer's challenges and help them achieve their ambitious Android Quality OKR

DEVELOPER SUCCESS

- **Fuji TV:** LRAP with FOD became fully effective on 4 Feb ([exec. summary](#)). FOD is the SVOD app run by Fuji Television, one of the five biggest broadcasters in JP. This is the first LRAP with a broadcaster in JP so it's impactful not only to google but also to the JP entertainment industry. After the signature, organized a kick-off meeting with Fuji TV to make alignment about the integration schedule. DevRel and NPE will offer technical support so that Fuji TV can complete all required integration to get LRAP certification by the end of September 2021, the end of Payment policy grace periods. [tsotome]
- **Microsoft:** Delivered [performance review](#) for OneDrive, which identified opportunities for increasing organic conversion, engagement, and LT subscriber retention. Gained commitment to implement high priority recommendations (including Account Hold, which MSFT was still delaying) [eblume@]
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PRODUCT SUCCESS

- **Google TV:** Conducted a post mortem session for Google TV Wave 2 BDM in APAC. Summarized tips/leanings based on real experiences of Wave 1 Country BDM. ([deck](#)) [tsotome]
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MARKET TRENDS, EVENTS, ISSUES



Play Apps BD Updates: Jan 2021

KEY UPDATES

- **Google Play Real Money Gambling (RMG)** Policy announced expansion to 15 additional regulated countries and introduced new requirements for gamified loyalty programs. The RMG expansion closes out an estimated 500+ app catalog gap with iOS, increases user Trust & Safety, as Android users will now be able to safely engage with these apps directly through Play instead of sideloading to their devices, and covers a major portion of global RMG markets, representing ~65% of the incremental Ad revenue opportunity for Google. Please see xGoogle BD Guide with talking points and FAQ: [go/rmg-bd-guide](#) [lenakatib, carolsoler, kerryfazio]

DEVELOPER SUCCESS



PRODUCT SUCCESS



MARKET TRENDS, EVENTS, ISSUES

- [TikTok newsletter Jan 2021](#) - highlights: BR content attack; strengthening privacy for youth; making TikTok more accessible to people with photosensitive epilepsy. [luli]
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Play Apps BD Updates: December 2020

KEY UPDATES

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DEVELOPER SUCCESS

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PRODUCT SUCCESS

- [AU] Led a product walkthrough session for Stan Australia as part of the GPB/Subscription pitch - positive feedback on the Play Subscription product offering, especially in light of Stan launching a new Sports offering as an add-on to their existing SVOD packages
- Skype launched support of Bubbles API and unblocked installation on ChromeOS. Will be working with us to improve Chromebook experience [eblume]
- LinkedIn publicly launched *Google Sign-In: One Tap* on Android in December, and has since ramped to 100%. They have seen strong lift in user login, but a small drop in signups. LinkedIn attributes drop in signups to users who previously not remember their accounts choosing signup, that now are using one tap to login instead [eblume]

Commented [1]: @skaram@google.com added another product launch

Commented [2]: thanks! do we have any performance data btw?

Commented [3]: Added some general observations LI made, but not specific #s. Will try and get more details when our team debriefs with them. but overall they are happy w/ impact

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MARKET TRENDS, EVENTS, ISSUES

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Play Apps BD Updates: November 2020

KEY UPDATES

- **First (and only ever) Lottery app launched in Brazil.** After almost a year of developer pressure, XFN hard work, and as one of the first wins of project Bingo, Caixa Econômica launched their Lottery app in Brazil, expected to reach millions of users by the end of the year. [carolsoler, LATAM]
- The inaugural Google Play Banking Advisory Board T&S Summit 2020 kicked off a global, two day, virtual forum hosting 7 strategic finance partners and Google executives, to engage in

open dialogue to illuminate emerging security threats, gain product feedback, and strengthen alliances. [lenakatib, carolsoler]

- Top-to-top meeting with SpinMaster, Toca Boca & Sago Mini, a leading kids app developer. The partner shared their vision for 'Uniting the World through Play', shared sneak peeks into their new apps, discussed challenges with monetizing child-directed content & highlighted emerging opportunities to pairing digital content to physical products. [jennahanlon, lisamartinez]
- Held a new xGoogle Consultation with Duolingo focused on international growth (30 Duolingo attendees including c-suite and 16 Googlers). Building on our first engagement in Q2, this session included market insights from Play, OPG, and AppDev and a well-received pitch for a new Go Global+ joint partnership that offers support services from each PA and developer resource/budget commitments. [scottgordon]
- Age of Learning (ABCmouse) launches new kids educational experience on Google Nest displays in partnership with Assistant GP team. Aligned with the launch of the new families hub, the developer was interviewed at Google Assistant Developer Day event and the experience was highlighted in the Keyword blog post [scottgordon].
- P&E Platform leadership met with Adobe Creative Cloud (CC) leadership to gain visibility into Adobe's product strategy across Android, Web, and CrOS, to secure commitment to develop a cross-platform partnership plan, and to identify how we can work together to accelerate development of Adobe's next-gen creative suite. As a next step, we will be working with Adobe to build a x-PA Joint Business Plan [eblume]

DEVELOPER SUCCESS

- Partnered with Steven Tepper from TechOps to deliver a Technical Consultation for Age of Learning, the #1 kids app developer and new AVP partner. Partner was so pleased and motivated by the consult, they scheduled a follow-up to share their optimization plan. [scottgordon, stepper]
- Presented Coursera, a newly managed partner with a Growth Consultation and India Insights as we encourage them to integrate Google Play Billing. Insights were shared widely across Coursera executives and prompted them to request an exec summit to discuss deeper partnership opportunities with Play and Android. [scottgordon]
- TikTok reported a long standing iOS vs Play user retention gap esp. for JP and KR. TechOps conducted UXC review and Go JP localization review, working with GC team on a user journey deep dive in Jan 2021. [CN, luli]

PRODUCT SUCCESS

- [AU] Along the launch of Google TV with Amati in Australia earlier this quarter we now have four local partners - **Stan, ABC, 9NOW and 7plus** - with completed integrations for the new Google TV experience

MARKET TRENDS, EVENTS, ISSUES

- Virtual concerts are becoming a mainstay strategy in massive multiplayer video games that are popular with Gen Z. Fortnite's Travis Scott concert in April pulled 12.3M attendees, Roblox' Lil Nas X concert on Nov 14th had 33M attendees and brought new levels of interactivity to the

metaverse. [jennahanlon]

- More Chinese developers, especially app developers, are creating new Play accounts under non-Chinese entities. [CN, luli]

Play Apps BD Updates: October 2020

KEY UPDATES

- New FR M&E service **Salto** launched with Play billing and signed a LRAP deal to ensure full integration of GTV features by Q1'21
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DEVELOPER SUCCESS

- **Watcha** successfully launched their service in Japan and featured as 1st pin in the JP Smerch section. Watcha is planning to provide movie content that is not available in existing services in Japan market as their key differentiator and has been collecting user preference on movies by servicing their Watchapedia app. [hjhj, tsotome]
- **Salto** launched in FR on mobile and Android TV (incl. GTV), 5 days after local Sabrina launch date with Play Billing. Ahead of the launch, Salto signed a LRAP agreement that will facilitate the full integration of Google TV features in Q1'21. Salto is formed by an alliance of the top FR broadcasters that have a combined TV viewing audience share of 70% and reach 98% of the population every month. At launch, Salto offers a live TV streaming and SVoD portfolio with 20 TV channels and 10,000 hours of content.

PRODUCT SUCCESS

- Adobe signed TTA and has kicked off two EAPs (ML Kit, SWOOP)

MARKET TRENDS, EVENTS, ISSUES

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Play Apps BD Updates: September 2020

KEY UPDATES

- **Google Play LATAM Apps Week**. Google Play LATAM hosted its first digital event in partnership with LCS, OPG and AppDev. 485 developers across LATAM attended the event and watched in total the equivalent of 31 days and 16 hours, watching on average 1h34min each. The sessions are now available on

demand and the content will be scaled through Google Play and cross functional channels. [rchamma, carolsoler, dpons. LATAM]

- **Discord launched 100% Google Play Billing in-app on 10/5.** This was the culmination of 6 months engagement with their product and partnerships teams. Discord highlighted the opportunities they see in a closer collaboration with Play BD and Google as the reason for integration. Discord was a top 10 Play billing policy violator. [samtolomei]

Commented [4]: @skaram@google.com
@daniellestein@google.com FYI Discord went 100% GPB this week!

Commented [5]: awesome!! well done

DEVELOPER SUCCESS

- **Growth Consults [IN]:** Initiated impact tracking and follow ups with 11 partners who we hosted the GC session with last month. Overall Event DSAT was 4.4. We had great feedback and follow up requests for almost every partner.
- **TakaTak Launch [IN]:** The MX Player team (subsidiary of the Times group) built and launched TakaTak a short form video app in just 72 hours, soon after the Govt. of India banned select Chinese apps. The app has over **18 Million users** in just 1 month post launch.
- **Disney+ Hotstar [IN]:** App launched in **Indonesia** on 5th September with local content offerings as well as the international content. Go-Global consults and app reviews in process. Featuring declined due to non-compliance with payment policy..
- **Mercari US Joint Consultation with Buyside:** As a part of JBP, provided business consultation with Buyside teams (IGT and LCS). Mercari US rapidly grew with the tailwind from COVID-19, achieving a big milestone of monthly \$100 million GMV (Financial Report). With our Growth Consulting, agreed to keep improving the user experience with their latest technology and functionalities. [JP, rkatayama@]
- **LIFULL HOME'S UI/UX full renewal project:** 9 months project completed to support LIFULL (top real estate app partner) to plan and execute a full UI/UX renewal with our latest design principles and technologies to improve the overall user experience with TechOps, DA and Material Design team. Renewal is fully released with improved and personalized user experience, with uplift in user engagement metrics such as DAU days / MAU and new install retention. Please see the deck for details. [JP, rkatayama@kkawabata@]
- **ABEMA AHC (App Hero Card) featuring [JP]:** Supported ABEMA PPV (Pay per view) ONLINE LIVE festival by offering App Hero Card in deep collaboration with Merch team. (screenshots). The featuring contributed to hitting the highest consumer spend/month thanks to additional revenue source, IAP, in addition to subscription (one pager analysis). [JP, tsotome@]
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PRODUCT SUCCESS

- **Launched first-ever JP ACC (App Content Card) featuring for Major partners in collaboration with merch :**
 - **Jump+ (comic app from Shueisha):** relocated Jump+ from Trending Manga featuring slot to ACC as an experiment. As a result, ACC generated 4.6x more installs with much higher acquisition rate and CTR, although the # of visit decreased to half than Trending Manga featuring. Will carefully assess the performance in the next few months. Full results here [rkatayama@]
 - **M&E apps (Abema and AWA from Cyber Agent):** Both apps demonstrated strong engagement results with much higher acquisition rate and CTR than mFHR benchmark. The results also proved that ACC can be an effective featuring slot to acquire re-installs. Promising incremental LTV as well. Full results here [tsotome@]

MARKET TRENDS, EVENTS, ISSUES

- **Investment Activity [IN] : Ambani's Reliance to Offer \$20 Billion Stake in Retail Arm to Amazon.**
Amazon hasn't made any final decision on the size of its potential investment, and talks could still fall apart, the person said. A deal, if successful, would not only create a retail behemoth in India but will also turn Jeff Bezos and Asia's richest man from rivals into allies in one of the fastest-growing consumer markets in the world. At \$20 billion, the deal would be the biggest ever in India as well as for Amazon, according to data compiled by Bloomberg. [\[Link\]](#)
- **China Apps Ban [IN] :** Indian government banned a further 118 Chinese apps including PUBG Mobile. Full list [here](#). This comes on top of the 59 apps which were banned last month including TikTok.
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Play Apps BD Updates: August 2020

Commented [6]: @play-apps-bd-all@google.com thank you all for adding snippets for august! I plan to send a bulk july & august "summertime" report this week. If anyone has additional updates to add, please drop in ASAP (or feel free to start adding sept updates starting tomorrow :)). thanks all!

KEY UPDATES

- **Real Money Gaming and IPL (IN) :** IPL 2020 (largest IN cricket tournament) is starting from Sep 19 till Nov 10. There is heightened scrutiny over how Play Policy (especially gambling policy) compliance is monitored/ enforced in India on Play distributed Apps (which are advertising partners for Daily Fantasy Sports players),. Multi pronged plan, resources unlocked and specialized focus group formed across Play Policy, Legal (IN and Play), TSPA enforcements and GBO (BD, LCS) to proactively mitigate and navigate key issues to provide proactive, consistent and timely response and action to mitigate reputation/legal risks. (shalinipoddar@, terazawa@)
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DEVELOPER SUCCESS

- **Salto (FR)** is launching in Q4 as a significant new OTT tv streaming service. The dev has committed in writing to signing an LRAP agreement and launching GPB with launch in Q4.
- Began negotiations of AVP deal with [Calm](#). Deal structure was warmly received by the developer, and the Calm team highlighted their appreciation of Google Play's partnership approach. [samtolomei]
- Began negotiations of AVP deal with [Smule](#). Successfully positioned the focus of the conversation towards mutual commitment to a long-term partnership, instead of focus on policy change. Smule clearly communicated their appreciation of the cross-Google partnership approach [samtolomei]
- Began negotiations of AVP deal with **Match Group**. Match has been highly engaged and agreed to stay neutral on the policy publicly as we explore the deal [bbarras]
- **Groupe Canal (FR)** has terminated their existing LRAP agreement. A new path based on LRAP++ and a multi-platform billing exception has been started with CDR review of potential terms. Partner talk to start once policy update has landed. [andrar]
- Began AVP discussions with [LinkedIn](#) with softpitch. LinkedIn is open to considering, and had a neutral response to GPB briefing [eblume]
- **Adobe's Aero Viewer** launching on Android in Q4 2020. Currently only available on iOS. [eblume]

- Microsoft Surface Duo (foldable built on Android) launching September 10th [eblume]
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PRODUCT SUCCESS

- **KakaoTalk** has committed to launch the sharing shortcut feature in early October regular update. [jihyunc, KR]
- KR devs showing high interest in **Android Auto** due to a leak mentioning SKT(Carrier)'s Tmap will launch Android Auto this year. Naver requested to join Watevra EAP, but will reject it because public launch will happen shortly. [KR]
- Launched "**Trending Food**" evergreen featuring cluster ([Proposal](#), [External Deck](#)) with 5 top partners from Food & Drinks category ([screenshot](#)) in collaboration with Merch. This is the 3rd "Trending" featuring collection after Trending TV and Manga. [JP]
- Play BD and Partner Dev Rel co-hosted a series of virtual **Android Developer Sessions** with **Adobe** with the goal of deepening partnership and upleveling Android-Adobe experiences on Android. Drew 150+ attendees across 20 product areas, and covered Android platform vision, developer tools improvements, reducing app size, media, form factors, camera, and monetization. [Event Report](#) [eblume@]
- **Policy Webinar (IN/ SEA)** : 191 reps from 81 companies joined us for a Policy Webinar that covered the Delhi Bundle update along with a refresher on the Location policy. Super engaging session with more than 60 questions from delegates. Avg. watch time was 39 mins. Event DSAT: 4.1/5. Event report [here](#). (shalinipoddar@, mounseok@, parultyagi@)
- (**Alibaba**) **Alipay**'s biometrics lab has been onboarded as Android-approved for testing biometrics systems for Android devices using the Android Test Protocols. This is after months of discussion and evaluation between Alipay security team, DA and Android security product team. [luli, CN]
- Tap-Mobile has integrated the CameraX API in all of its major apps [alorch, IL]
- **Mobilis** implemented RTDN and account hold and is impressed with the early results: they were able to recover over 12% of the users on Account Hold in the first days alone. [carolsoler, weslyvianna, LATAM]
- **2020 U.S. Elections Integrity**
 - In collaboration with Play Merch, GAPP, Policy, and YT we launched **2 Topic Pages** on the Play Store for 8 days to feature the DNC & RNC Conventions' livestream, as well as, the officially nominated candidates apps to connect our user with real time trusted information when they need them. The first Topic Page was from August 17th - 20th for the DNC Convention, while the second was from August 24th - 27th for the RNC Convention. Performance data for both weeks [justkatherine, pannell, ashrafh]:
 - **DNC**
 - 1.2M banner impressions
 - 12.8K clicks
 - CTR: 1.03%
 - **RNC**
 - 1.7M banner impressions
 - 16.9K clicks
 - CTR: 1.02%
 - In collaboration with the ASAP, DevRel and DevMarketing we launched the "[Guide for building secure government apps](#)" and "[Security Best Practices Guide](#)" online resources to equip developers with all the necessary knowledge and tools to secure their apps and protect our users. [eliderman, jmarkoff, lilysheringham, ashrafh]
- **Microsoft** aiming to launch **CameraX in Office Lens** in September. Have agreed to work with us on a Case Study [eblume@]
- [Skype](#) and added **Android Auto** support; Microsoft Teams in process [eblume@]

MARKET TRENDS, EVENTS, ISSUES

- Sponsored Naver Webtoon's Gaming event with xfn team's support and offerings. Publicly announced the sponsorship on media. GPP, Merchandising, and LCS will provide developer promotion, featuring, and ads consultation to winners of the program. Project doc. [jihyunc, jamielee, KR]
- JP Apps team hosted **Apps Core+ Webinar** on 8/5 in collaboration with the Core+ team & DevMkt. We invited 12 key decision makers from 6 developers in various industries to encourage idea sharing. The theme was set on Subscription & Growth Consultation. DSAT resulted in 4.4, and our target GC for Core+ webinar candidates has been met. (Presentation) [JP]
- JP put together a discussion doc regarding **Policy Violation Enforcement & Subs Auto-Renewal Functionality** following take-down of FamilyAlbum by mixi from the Play Store due to policy violation resulted in the loss of 83 subs worth \$373. This is due to the current intended function which subs are cancelled for users whose subs auto-renewals are planned while apps are being removed from the Store. Based on mixi's case, raised the issue to PM (@angelaying) to find that the product fix is planned in 2020. Until then, new cases should be added to PRD. Reg pre-policy enforcement internal comm has been currently discussed with the policy leads. (megtakada@, evankojima@)
- **Android and Play Advocacy (IN)** : The Secretary, Ministry of Electronics and Information Technology (MeitY) - Ajay Prakash Sawhney, launched a report yesterday on the "**Contribution of Smartphones to Digital Governance**". The report was commissioned by the India Cellular & Electronics Association (ICEA) and authored by KPMG. As part of India's extensive competition advocacy campaign, GAPP spearheaded this effort to drive home a singular message: that **Android and the Play Store are keenly supporting the government's 'Digital India' program**. One of the key findings of the report is that there are more than **300 core government apps on the Play Store, which can unlock 80% efficiency gains and reduce processing times for e-governance services by 8x**, which can provide benefits to the 450 million+ smartphone users in India. The report also predicts that India will have 820 million smartphone users by 2022, a large portion of whom will be from rural areas (IN)
- **Nikkei DX Summit**: As a follow up to the special GC session in 2019Q4 with GC team to support first penguin partners on Digital Transformation, held 2 days DX Summit for Nikkei, collaborating with LPS and Partner Plex [planning doc and full deck]. This year, Nikkei launched DX office in 2020Q1 to better digitize their services and internal org structure. Head of DX office and 4 GMs joined the session with active discussions [JP, rkatayama]
 - Day 1: Google Play session covering how to achieve product DX
 - Day 2: LPS/Partner Plex session covering how to solve challenges of internal DX & distributed work
- Kevin Mayer resigned from **TikTok** global CEO after 3 months since he's onboarding. US GM **Vanessa Pappas** (ex-Youtuber) is the interim CEO for TikTok. [CN, luli]
- **Microsoft xCloud** publicly announced special version of the Xbox Game Pass app coming to Samsung's Galaxy Store that allows players to make in-app purchases. Ending tests with Apple for now due to Apple policies. Will be pursuing consumption only on Google Play [eblume@]
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Play Apps BD Updates: July 2020

KEY UPDATES

- After 3 years of discussions, WW (fka WeightWatchers) has launched 100% GPB globally. WW is the #4

grossing fitness app on iOS and has been one of the biggest GPB holdout devs over the years. Decision was driven by a desire for a deeper partnership with Google Play [samtolomei]

DEVELOPER SUCCESS

- Collaborated with TechOps to deliver a Tech Consultation to PicsArt, reviewing their device level performance in Indonesia, India and the US. Analysis highlighted key issues for PicsArt performance on low end devices in India and Indonesia (key markets for their growth). Provided actionable recommendations for PicsArt to investigate around cold-start times and network optimization. Follow ups to come [stepper, samtolomei]
- Calm recently tested and implemented subscription price changes in India and SP-LATAM based on Play recommendations. Results were an increase in Indian user LTV of +11% and SP-LATAM user LTV of +8%. Additionally, Calm rolled out monthly SKU options in India, SP-LATAM, Brazil and Korea based on recommendations. [samtolomei]
- Global Tech Consultation with TechOps to MANGA Plus, a global comic app from Shueisha: reviewed their device level performance in US, MX and TH. Also provided UI/UX consultation to improve their challenge of user engagement. Reconnecting with the partner in early Q4 to follow up with their implementation results [kkawataba, rkatayama]
- Created a pre-briefing template for unmanaged partners you have never seen, which helps you explain who we are & what we do in order to make a collaborative atmosphere before starting to talk about the policy language clarification. [Japan]

Commented [7]: @skaram@google.com FYI just added this update to the July section of the snippets, though I see you added an August section above— let me know if I should move this WW announcement to August, as it did technically happen in August

Commented [8]: both work thanks as ill be sending a rollup for both july & august this time. thank you!

Commented [9]: @cheryljones@google.com @stepper@google.com FYI inputted the techops consult

Commented [10]: @daniellestein@google.com FYI another (small) pricing recommendation win with Calm

PRODUCT SUCCESS

- **Recruit** - As part of the XPA JBP 2020 initiatives, held GC to their focus apps Townwork and Hotpepper Beauty. Since these are not monetizing apps, agreed to focus on UA UIUX improvement as the next step. Next step is to host a UIUX consultation session for both apps. Especially Hotpepper Beauty plans a radical UIUX update within a year, and we will aim to provide best practices to achieve their acquisition goals by providing the consultation [Japan]
- **2020 U.S. Elections Integrity**
 - In collaboration with Play Policy & Ops, GAPP, and Security we worked closely with the top candidates' apps (Official Trump 2020 and Vote Joe) to help them resolve any security and/or privacy vulnerabilities to protect our users and increase their preparedness during the 2020 U.S. Elections' high-risk events. [harryj, jphilk, camillestewart, ashrafh]
 - In collaboration with Play Policy & Ops, GAPP and Security we helped very sensitive Political apps (such as Parler and Citizen) to resolve digital security vulnerabilities and protect our users' information. [harryj, rahmanj, jphilk, ashrafh]

Commented [11]: @rkatayama@google.com Added this topic since you couldn't introduce this template in the US-APAC Apps team meeting. Please modify the language as you like!

Commented [12]: Thank you Evan-san!

MARKET TRENDS, EVENTS, ISSUES

- JP Apps 2020 - Category One Sheet: Created a one-stop view for JP Apps team's key focus categories and apps. This deck is aimed at XFN teams to easily refer to focused categories, key apps, and its initiatives. First page for each category includes industry overview for its highlight and lowlight as well as key apps. The second page summarizes initiatives for these key apps at high-level. We hope it's useful for both XFN teams and teammates to quickly understand our priorities for each category. [Japan]

Play Apps BD Updates: June 2020

KEY UPDATES

- Remove China Apps in IN and Google's public statement (By Sameer). Following TikTok's 1 star review spikes in IN. [luli]
- piccoma: One of the largest comic apps ranked in top 10 revenue generating titles in May in Japan with \$6.1M monthly consumer spend, by running a massive in-app event to celebrate their 4th anniversary. At max, users were able to get \$20 equivalent incentive (coins and free-to-read gifts) by visiting the app for 22 consecutive days. It is our first time to have a non-game title in top 10 monthly consumer spend. [Japan]
- Recruit: A cross-Google JBP 2020 reached an agreement and was closed. This is the seventh year of JBP with Recruit. This JBP aims to accelerate and build strong multi PA relationships including GCP, Web, Apps, Assistant/Search, Google My Business and Ads, and deepen C-level engagement so that we can uplevel partnerships further with Recruit. Play will work with XPA Google teams and Recruit's key teams to execute Growth Consulting for at least two apps by the end of 2020. (Business impact: Recruit ranks #10 market cap in JP. To Google, Recruit is #2 ads spender to LCS, #1 BigQuery user in JP) [Japan]
- BT Sport (PO Sabrina partner) launched a beta of their Android TV application. BT Sport is a key differentiator for the UK market, as it is major live sports provider and is not currently present on Amazon Fire.
- Rappi, the leading on-demand delivery app in LATAM and first super app in region, is interested in launching gambling services in the app. We had valuable calls with Rappi co-founder and his execs to share our current Policy. This confirms the high level of interest in LATAM for gambling. [dpns]

DEVELOPER SUCCESS

- Conducted Tencent WeTV H1 QBR(2019.11~2020.4), 3x subscribers(240K) and 3x monthly subs revenue compared to 6 months ago (2019.11). Dev decided to merge two major apps together in H2 that will lead to bigger user base. [mayama]
- Reliance Jio : Conducted a joint meeting on GPSRP with Reliance Jio (largest Indian telecom/ digital services company with over 50 apps). High interest on the back of app vulnerabilities shared ahead of the meeting and potential impact for Jio. [adambacchus, brooked, shampoddar]
- Hyperconnect has launched a new dating service called Slide targeting mainly to the US market. KR BD team is planning to have goUS session for their new dating service along with their live streaming service Hakuna [jlee, KR]
- My Little Pony: Color My World, the next release from top Google Play Family partner, Budge Studios has passed Teacher Approved pre-review. Color My World is a genre mash-up between a world-builder and relaxing coloring game. Their launch will be featured with a FHR banner the week of 7/16. [jennahanlon@]

PRODUCT SUCCESS

- Airtel is launching an Airtel Lite App with the core functionality of mobile top ups. They will add subsequent features for radio/ light content catalogue post launch. Joint consultation with Dev Rel on strategy (Airtel already has the Airtel Thanks App for customer service and loyalty programme offerings).

While they have adopted app bundles and dynamic delivery for Airtel Thanks, still see the business case for building a "Lite App" intended for chiseled out use cases, simpler UI/UX etc [shalinipoddar]

- Subscription Price Change BD Tips: summarized subs mandatory price change learnings and tips with an example. The deck explains what are the decision making points for developers to determine how to conduct price change (grandfathering vs. mandatory price change) with partner's actual data. [rkatayama, JP]
- **Viber** - Android Developer Blog post by and Google about their integration with Scoped Storage [Link, @alorch, bfarber@]

MARKET TRENDS, EVENTS, ISSUES

- **Naver Webtoon** announced their reorganization of business by elevating its US based Inc. to global head office to accelerate the go global. As part of reshuffle, Webtoon Entertainment acquired the entire stake in Line Digital Frontier and Naver is taking a big bet to take Korean contents to global with the ride on K-wave fever. [jlee, KR]
- From Citizen to Signal, the most popular apps right now reflect America's protests [maryliz, I put this in here but we should confirm this w/ our own data]
- Israel Sustainable Growth Forum - 1st meetup. The meetup's central theme was around the impact of Covid-19 on mobile apps; JoyTunes (IL), VL Media (TR) & Mediotopa (TR) shared their insights with other developers. Event report. [alorch, cothomson, francescaf, IL, TR]
- Google Play Billing coverage in the Middle East from the lens of a leading partner - Anghami [report, alorch@]
- Zynn, a new video app from Chinese company Kwai (a rival of ByteDance' TikTok in China), quickly risen to the top of the app store charts and pays users for views and referring friends. The app was removed from Play under DMCA terms this week while the complainant had reached agreement with Zynn and is withdrawing the copyright complaint. [luli]
- Significant PR and GAPP challenges on the back of Policy issues in the region. Top of mind is Remove China, Mobikwik app removal, Mitron suspension. Issues on Mitron have been resolved (the founders escalated to Sundar through their investor). The path forward on remove china apps and comms for Mobikwik underway with Policy, Legal, GAPP and PR underway [shalinipoddar]
- **Disney+Hotstar** branding change in India, triggered a huge surge in Trademark violations of the older, more popular Hotstar logo. Over 60 TM app violations reported by Hotstar within 30 days and growing. Executing 2 pronged approach to solve: 1. Workaround in consult with Policy 2. Propose Anti-Piracy workshop with Hotstar. [sharantulsiani]
- **JP Brown Bag Session - Foresee & Trigger the Growth**: Held a session on the topic of ecosystem development with a specific example of growing Comics category. Key takeaway is to foresee the growth by checking consumers' demand and developers supply. Link to deck and recording. [rkatayama, JP]
- Lightricks has decided to precede its Android roadmap schedule and launched Quickshot this week instead of Q1-2021.
- Minecraft donated all revenue generated on Juneteenth to the Black Lives Matter Global Network Foundation, Equal Justice Initiative, and the NAACP Legal Defense and Education Fund in support of Black Lives Matter. Announcement here. [jennahanlon@]

Play Apps BD Updates: May 2020

KEY UPDATES

- Hosted the first engagement in the #PlayTalks: Lift Yourself & Others BD Series. This talk was given by our APAC BD team who provided COVID-19 regional impact & best practices for managing developers through the pandemic - Deck & Recording [@hjhj, @rkatayama, @kananrai, @rachelcheung, @luli, @bbarras]
- Kicked off a Quality Improvement Program to 10 apps of the BR Government Account, hosting a kick off session to +65 people from 12 different Gov't institutions. [carolsoler, LATAM]
- Hosted 2 webinars in LATAM for Play managed and X-Google developers. The first one focused on RTDN and it was hosted by Neto Marin (PT_BR) and Diana García Rios (ES). The sessions were attended by 44 managed partners. 90% of participants stayed for the entire time (90'), many showed high engagement by actively participating and asked for a follow up webinar focusing on product/business profiles. The second one focused on Accessibility and it was presented by Shailen Tuli and Brandon Barras, to 63 local managed partners. 80% stayed for the duration of the session (60'), many of them were able to do a live demo with TalkBack. [carolsoler, dpons, LATAM]
- Korea team hosted a regional version of CORE+ webinar by inviting 102 participants from 22 developers including alliance/major partners. This was a great chance to introduce the value of the growth consulting team to a broader audience within our managed partners and our POCs were especially happy because us emphasizing the importance of engagement metric provided good rationale to adjust priorities of internal stakeholders. (Summary & Feedback) [hjhj]
- Major milestone for the EMEA Sabrina project: came to a top-line agreement with BBC on prominence for ATV & Sabrina; sent MPA (bespoke distribution agreement) redline to the BBC. [vesnadoknic]
- Launched "bedtime clock" in the Google Clock, partnering with Calm and Spotify to bring their sleep-related content catalogues into the clock experience. Also enabled Calm to be part of the Clock's alarm clock experience, enabling users mediating as part of their morning routine, a key product ask. [samtolomei, schroeer]

Commented [13]: @schroeer@google.com as FYI

DEVELOPER SUCCESS

- EMEA M&E: Accelerator deal for ProSieben (ADAP) has been approved, expecting partner's signature in approx. 1 week. LRAP agreement for Sabrina PO partner Joyn has been fully approved and signed by partner. The new "LRAP+" accelerator tier for live TV providers will likely become available in May and is expected to unblock significant EMEA developers such as Molotov (FR) for GPB subs. [andrar]
- Exploring a Accelerator-like deal with LinkedIn: LinkedIn recently approached us to re-evaluate integrating with Google Play Billing. At the moment, they are making product investment decisions about their payments platform, and therefore proactively re-opened the conversation. Next step is a to-be-scheduled product-to-product discussion. We are intentionally moving slowly as we await 1) sign off on levers and 2) clarity on policy. See Situation Overview for more details. [eblume]
- Exploring Accelerator-like deal with Audible: Audible expressed willingness to explore Google Play Billing and shared valuable intel on why they integrated with Apple Billing and how they got over the line. However, they would likely follow other apps' lead (as they did with iOS) given capacity (e.g. Music, FreeTime Unlimited). In parallel, Prime Video shared intel that GPB may be blocked by corporate. See Situation Overview for more details. [eblume]
- Android Sessions: Collaborating with the Android product team to hold a series of virtual sessions across Adobe product teams in May. These sessions are intended to address the "near-term" product opportunities, and are a precursor to overall Roadmap discussion that is targeted for July. See go/pdr-adobe-android-sessions for more details [eblume]
- Lightroom Performance Review: We are working with Adobe Lightroom on an opportunity assessment, to be delivered May 21st. Adobe shared intel that Apple has recently started providing similar "business reviews" (Lightroom only, thus far)

Commented [14]: +eblume@google.com fyi if you want to reach out re: Audible

- Trending webtoon, the merchandising effort to highlight the comic devs with content forwarding format has launched in the Indonesia market with 4 top comic developers : WEBTOON, KakaoPage, CIAYO, Magatoon. Trending webtoon will show popular webtoon contents as evergreen for 2months till early June. [ljllee]
- Hyperconnect reported few drops in KPI performance and doubted the network issue in the MENA region. No issue reported in SA/AE according to the Middle East team except flagging by VoIP in some markets. [ljllee]
- GoPay, the 2nd payment partner in Indonesia is exploring the partnership opportunities with Webtoon developers to grow consumer spend and new user acquisition. WEBTOON is already working directly with GoPay and considering pitching to KakaoPage as its next partner.. [jihyunc,ljllee]
- Conducted technical review for Webtoon on Indonesia market w/TechOps([go/te-webtoon](#)). Deep-dived on crash/ANR issue with DA([link](#)). Interesting insights on Chrome webview crash coming from Ads networks. Partners, including Naver, see differences in their crash monitoring system vs console data mainly the difference coming from not being able to capture webview crashes. Partner committed to improve support on low/mid-end devices and grow the QA process. First technical consulting to an App developer in KR. Pitched on potential dynamic features on their app. [jihyunc]
- Go US sessions with iQiyi (leading OTT app from China) with M&E US team, leading to developer commitment to investing more on ATV, and kicking off internal processes for potential LRAP opportunity with iQiyi. Session 1 - ATV, Session 2 - Go US [jennamok,luli]
- Gained exec buy-in from SiriusXM (Pandora parent company) to integrate GPB as a part of their Android app relaunch in Q1 20201. Kicking off ADAP deal term discussions and will partner closely on their rebuild and GPB launch. Big opportunity to help SXM grow their current user base of ~35M subs across all platforms [bbarras]
- Viber is the first EMEA partner to implement and test Developer lead Refunds API. I will share the before and after results within a few weeks. [alorch]
- The relationship with Walmart has seen some bumps in the past few months. However, we've invested in return to a 'healthy state' and only recently established a strategic ENG partnership with Walmart. Walmart is equally excited about the opportunity to better align with Play/Android, stating: *"this is exactly what we've been looking for from Google."* Given Walmart is in the midst of restructuring their App (combining retail + groceries app), this is a critical time for us to add value for the partner and build loyalty & trust. [ranjodh]
- Zoom's overall appetite to engage with any of the xPA Google teams has been minimal, from a strategic and creating Android stickiness POV. We were able to establish a dialog with their mobile ENG team to highlight their Android app performance issues and conversations have continued via email. Zoom does have some additional asks outside of Play/Android (e.g. to be connected w/ML & Media teams). However, before engaging on anything else a proactive engagement by Zoom on resolving their app performance issues is needed. [ranjodh]
- Conducted first Business Consult with Adobe (Lightroom). Biggest opportunities identified included improving D2-D28 new install retention and free to paid conversion. Team to focus first on testing localized pricing and free trials, as well as implementing Billing Library 2.0/3.0 which will gate future product opportunities. See Performance Overview. [eblume]
- Process built to address Alexa "bad actor apps" is having positive results and the partner has recognized Google's contribution. Amazon filed a civil lawsuit against an international ring that was scamming users who were setting up their Alexa devices. [eblume]

PRODUCT SUCCESS

Commented [15]: @luli@google.com @jennamok@google.com very cool, can you please share the material that was presented? wondering if we can repurpose some content for other subs apps looking to increase investment in the US market cc @danielstein@google.com @bbarras@google.com

Commented [16]: Yes - interested in seeing! Thanks!

Commented [17]: +1 @maresca@google.com is also working to have Pandora included in the Sabrina / Amati pre brief as they're keen to invest more in ATV

Commented [18]: Hi team! Here is the M&E deck we presented to iQiyi. Most are M&E specific, please let me know if you have any questions! Also, we are examining the possibility of pitching LRAP to iQiyi to drive more investment to Android and Play.

https://docs.google.com/presentation/d/1sjwuBgagROLHRZmBNOUzT9f7v9dTJaGXFxxhV0wPc/edit#slide=id.g6cc848847d_0_6

Commented [19]: second round here - https://docs.google.com/presentation/d/137R-XkI9zm6RBHy7uADQLTLT3P3I2Q7aQHMMxCNWOQw/edit#slide=id.SLIDES_API603370487_0

Commented [20]: Thanks! @skaram@google.com we haven't been able to gain approval from product to brief music devs on Amati / Sabrina as of yet which looks like the majority of the discussion. @maresca@google.com has been working to gain approvals, but we've gained little traction

Commented [21]: Don't have access to second round deck, but looks like first round deck was primarily the standard M&E pitch - are you consulting with them on how to particularly localize their offering/prices for the US market?

Commented [22]: @skaram@google.com FYI Assigned to Sarah Karam_

Commented [23]: nice! thanks for the update

- Whitelisting solution for discounted VAT rates (relevant for EMEA news, audiobooks, etc) is ready to be launched for partners soon, resolving a long standing issue of not paying partners the expected rev share. Final clarification between PCounsel, Legal and PM is in progress. [andrar]
- Globoplay shared with us the very positive feedback on RTDN after reducing involuntary churn in 2pp in the first 3 month after implementation. In early May they also fully migrated to Google Play Billing Library 2.0 and launched an annual subs plan, previously only available on their web platform. [carolsoler, LATAM]
- Met w/ **Wall Street Journal** to present AndroidTV opportunity. Currently on all other OTT platforms. (Medium Post) [brianconnor]
- **Three successful product design workshops show promise for custom integrations:** Camera Go/Snap Lens Kit, Gboard/Bitmoji, and People Features/Snap messaging. [nmontaperto]
- ARCore: The Amazon Shopping app drives the highest MAUs for the ARCore SDK. We are engaging the shopping team to prove feedback on the experience [ebiume]
- Foldables UX: Adobe Rush is engaging with UX team to provide feedback on initial concepts [ebiume]
- Android Auto team is exploring a EAP with a few of our partners, including Uber/Lyft. This EAP expands the app categories supported in cars to include turn by turn navigation apps, as well as other app categories with use cases that benefit from maps and navigation APIs. A meeting with Lyft has been set & Uber has deprioritized for the time being. Given Google/Waymo's recent history with Uber, the initiative was vetted by Auto PCounsel & Waymo PCounsel/CPO. [ranjodh]
- Watcha Play committed to implement the 'What to Watch' feature for more rich content within Google search results. [hjh]
- Banking Advisory Board hosted 7 Android Security Roundtables for Banking & Finance Apps, which provided valuable insight and global security threat trends from 9 different financial institutions, and revealed the opportunity to improve brand with Turkish banks. [lenakatib] [carolsoler] [kyliem]
- TikTok has officially joined **Google Play Security Reward Program** after months of discussion with GPSRP/Play, meanwhile taking advice from Google about building their own bug bounty program. [luli]
- ByteDance met with the Android design strategy team to provide feedback and exchange ideas on foldables design concepts. [luli]
- **Play SDK Console** launched to 10 early access partners, that together impact ~270k apps and games, and reach ~59B downloads. The features and functionality of the console at launch can be found at go/sdk-console-outreach [lenakatib]
- **Instagram more likely to extend dual Front/Back camera feature to Android** - Samsung has agreed to OTA update support for the S9, Note9, S10, Note10, Galaxy Fold, and ZFlip, which dramatically increases the TAM for the feature. [nmontaperto]
- **Rakuten**, one of the largest JP IT giants created and shared their a11y guideline to apply across all Rakuten apps (link). Rakuten developed the thorough guideline spending a year after having a meeting with Play BD & Accessibility team in 2019 Q2. Based on this guideline, they are planning to review the UI of some of their apps by the end of 2020. [rkatayama, bbarras]

Commented [24]: @bbarras@google.com
Thanks Brandon for meeting Rakuten last year! They finally developed company wide guideline.

Commented [25]: awesome to hear! Can't wait to come back :)

MARKET TRENDS, EVENTS, ISSUES

- **ByteDance Ltd.** announced it has named Kevin Mayer (former VP of streaming @ Disney and head of Playboy.com) COO of ByteDance, and CEO of TikTok, effective June 1. He will report directly to ByteDance Founder and CEO Yiming Zhang. Kevin will be charged with driving the global development of ByteDance, as well as overseeing corporate functions including corporate development, sales, marketing, public affairs, security, moderation, and legal. [luli]
- **ByteDance**, 8 years since its launch in 2012, more than doubled its revenues from \$7.4 billion in 2018 to \$17 billion in 2019, according to Bloomberg. [luli]

- Efforts with establishing a strategic partnership with Slack have been very high with very little result, with intro meetings held with their ENG/marketing teams and multiple product offering outreaches (e.g. People & Conversation). Slack has a platform partnerships team, and we look to continue to find the right POC - decision makers - within that team. [ranjodh]
- Facebook acquired Giphy for \$400M and plans to integrate functionality into Instagram and other apps. We anticipate tensions in any expression related workstreams due to the new direct competition between Giphy and Tenor (owned by Google). There's also speculation that Giphy will be an Onavo replacement.
- Facebook took a bold step into ecommerce with the announcement of Shops, which gives businesses the ability to transact through their FB and Instagram pages.
- Disney Japan to launch Disney+, targeting June 11. Disney Japan originally had 3 different Japan specific streaming services; Dlife, Disney Theater, and Disney Deluxe. With the launch of Disney+, all services will be merged and re-branded as Disney+.

Commented [26]: @jennahanlon@google.com FYI

Commented [27]: acknowledged - thank you

Play Apps BD Updates: April 2020

KEY UPDATES

- Worked closely with the **BR Gov't** for the launch of the Emergency Aid app for unemployed citizens. The app had more than 12M downloads in the first day and over 30M on the first week. To help support users, it has also been featured on an informative COVID editorial page on Play. [carolsoler]

DEVELOPER SUCCESS

- **NYTimes** launched A/B test on a "Registration Wall" for non-subscribing users who hit their free article limit that will open up access to more functionality and additional free articles. Tracking conversion and engagement metrics. This is in tandem with several design and onboarding discussions, kicked off here [brianoconnor]
- Conducted three product design workshops with **Snap** to flesh out ideas for integrations into Gboard, the Android System UI, and WearOS. Strong interest on both teams to go deeper in all three areas. [Gboard, SysUI/Notifications, WearOS] [nmontaperto, NA]
- **Bermuda** is observing enhancement in subscription conversion after changing price and offer (focused on giving out gem rather than additional features). Before Play consultation, Bermuda team had only one subscription SKU with same price all over the global market. [hjh], Korea]
- Officially kicked off BD pilot effort with **Google One** during XFN review between Play Commerce and G1 teams. QBR slides here with next steps being GC and opportunity analysis in coming weeks. (brianoconnor)
- **Play Billing launching on Instagram In June:** Facebook is adding the option to charge for access to live streams. They have been more proactive and unusually forthcoming about their plans to use Play Billing and want to learn more about best practices. We are actively engaging with Play commerce team to support the upcoming IG launch. [nmontaperto]

Commented [28]: +brianoconnor@google.com any results so far or links to anything we presented to them on this topic?

Commented [29]: Moved this to April since it just launched and will add results/content

Commented [30]: limited results so still holding here. FYI

Commented [31]: thanks - do you have any links to add to notes from discussions? or would you prefer to wait until the may update to share?

Commented [32]: I pinged them for an update. depending we could keep or push. Let me grab some of the relevant discussions

Commented [33]: +nmontaperto@google.com moved to april FYI

PRODUCT SUCCESS

- Peloton launched on Android TV, just in time to capture the large increase of demand for home workout content. Peloton's launch is unique as few other non-M&E apps have built for the living room to date [samtolomei]
- Waplog (dating app) managed to decrease its app size by 52% (from 92MB to 46MB) after implementing app bundle. [presco - alonch]
- Launched partnership deal with Precise Biometrics, which enables testing and data to shape Android security standards, ultimately improving security for users and financial institutions [lenakatib]
- **Globoplay** is the first developer in BR to be whitelisted for LiveOps cards and it's using it to promote the event with one of the highest audiences of the year: the finale of Big Brother Brasil 2020 [carolsoler, rmaresca]
- **LiveOps Card**: Top comic app partners started promoting their in-app events with our LiveOps Card. Jump book store and Magapoke promoting limited time offer of extra free content, and Sunday webry offering 1 month Subscription free trial [photo gallery] [rkatayama/JP, rmaresca]
- **3 Case studies published** to share best practices from top partners:
 - MatchingAgent, dating app: Increased user LTV by 30% leveraging our Subscription features and A/B testing with Firebase. The partner continuously executed experiments since 2017 as they optimize their business model by adding new subs features [tsotome, JP]
 - nikan, language education app: Increased user LTV by optimizing the Subscription plans conducting a lot of A/B testing with Firebase. After started offering 3 plans (monthly, semi-annual, annual), saw significant uplift in paid user conversion rate. Over 70% of the subs users are now opted for an annual plan [tsotome, JP]
 - LIFULL, real estate app: After integrating Dark theme, user retention of LIFULL HOMES increased by over 10%. The article shares the process of how they integrated it and also how they are optimizing the Dark theme notification. Detailed report here [rkatayama, JP]

Commented [34]: +samtolomei@google.com moved to april fy!

Commented [35]: ty- I was a bit confused on which month had been sent

MARKET TRENDS, EVENTS, ISSUES

- Rest of the world install drop - When a country becomes available for targeting in the Console while it was also part of the ROW cluster before, we have a process to enable it for devs that previously targeted ROW automatically. Viber reported a significant drop in installs in Iraq, and following an investigation, we identified an issue with our backfill process. [Postmortem: Rest of world install drops] [alonch]
- **Cross content offering amount 2 comics developers**: "One Park" collaboration by Manga One and Manga Park accelerated by COVID-19
 - Top comic publishers started an interesting collaboration to cross offer their content. Manga One to provide their top titles in Manga Park, and vice versa. By this collaboration, these 2 apps are unlocking over 20+ comic titles for free. Exchanged comic titles are now in top ranking of the most consumed titles in each other's apps. First time collaboration across different comic apps [rkatayama, JP]

Commented [36]: +alonch@google.com has this now been fixed for all devs targeting ROW?

Commented [37]: +skaram@google.com I don't think so. This bug (among some) should fix the problem backward, but it has not been completed yet. <https://b.corp.google.com/issues/152319777>

This one should address the problem moving forward: <https://b.corp.google.com/issues/152319924>

Play Apps BD Updates: March 2020

KEY UPDATES

- We transitioned the Google Play Security Rewards Program in-house, and ended our partnership with HackerOne. Making this change will improve triage quality, internal automation and reduce overall program costs [brooked@, adambacchus@]
- Hosted the first Trust Safety forum attended by Tinder, Airbnb & Lyft to gain a better understanding of areas of developer focus and partnership opportunities around online and offline safety. The 2hr VC was

attended by 12 of our partner's Sr. T&S stakeholders, as well as Android's T&S Eng Director [kshams@](#)
[[@bbarras](#), [@ranjodh](#), [@eblume](#), [@lmartinez](#)]

- P&E Leadership met with Adobe Creative Cloud Leadership for a virtual Executive Meeting, to bring more visibility into Adobe and Google priorities and align on areas of opportunity to partner. As an outcome, Google will collaborate more closely on delivering near-term product success, guiding their future platform investment strategy, and shaping their next generation products and go-to-market approach [[@eblume](#)]

Commented [38]: +maryliz@google.com

DEVELOPER SUCCESS

- EMEA M&E: Accelerator deals for ProSieben (ADAP) and Joyn (LRAP) have been approved, expecting partner's signature in approx. 1 week. New LRAP+ accelerator tier for live TV providers will become available in May and is expected to unblock significant EMEA partners such as Molotov (FR). [[andarar](#)]
- Education developer Blinkist to launch transactional audio book service on top of existing subs business. Developer is eligible to non-standard VAT rate in DE; to be applied on app level by end of April. [[andarar](#)]
- Collaborated with TechOps to review of Smule's new user onboarding flow, combining business review metrics with actionable UX and UI feedback. Smule found deep value in the holistic approach, and is implementing several recommendations already. [[cheryljones](#), [samtolomei](#)]
- Working with APAC TechOps on Subscription upsell consultations in light of the upcoming Subscription policy updates in April. Will use the review feedback in upcoming GCs or conversation with key partners post policy launches. [[cn](#), [luli](#)]
- Identified iQiyi's exceptionally high churn rate with the support from subs PM and BDs. iQiyi is rethinking their subs strategy and adjusting free trial offering. [[cn](#), [luli](#)]
- **Kwai** reported **positive uplifts** in store conversion and retention driven by store listing experiments; in-app feature and content update and engagement campaigns, in light of the opportunities identified from the latest GC with UVideo, VStatus and MV Master; the GC was followed up by **TechOps UX reviews** for the three apps respectively. [[cn](#), [luli](#)]
- **Alibaba's DingTalk** (a Zoom/ Slack alike, enterprise communication, collaboration and HROps platform) urgently launched an International version of the app DingTalk Lite on March 20, in response to the recent UNESCO recommendation for distance learning tools. BD and DA are actively working to get them up to speed on Google Play, policy, product quality best practices. [[cn](#), [luli](#)]
- **AbemaTV LRAP**: Fully executed LRAP for AbemaTV, which is first LRAP in JP. This is the strategic deal for Play, not just for Sabrina launch. As a prep for the upcoming billing policy update, we'll work on selection of future LRAP candidates based on the impact of LRAP with AbemaTV so that we could shorten their grace period and/or prevent them from shifting to the consumption-only mode [[tsotome](#)]
- **Yahoo JP**: Had a mtg with the director of CTO group to align this year's initiatives between Google Play and Yahoo JP. Crafted this deck to get buy-in about our proposal including OKR related integrations from the decision maker since 1)Yahoo has many apps related to our Product OKR and 2) BD has a concern that sending many messages separately in EN causes confusion from the developer. The Meeting went well with the deck because BD was able to highlight the message that working on product OKR related integrations are beneficial from the viewpoint of Android users and Yahoo JP. To scale this success, already shared the deck with PS team [[tsotome](#)]
- As **SpoonRadio** is planning to have major design changes for their goUS and goEMEA, worked with TechOps to consult on UXC; SpoonRadio is planning to revamp the current design based on the recommendation before their official launch in the global market. [[llee](#), [KR](#)]

Commented [39]: +cheryljones@google.com FYI added a snippet about the Smule engagement. Feel free to tweak as you see fit

- Kicked off an App Health Summit with **Facebook**, focusing on core performance, stability, and tooling challenges, leading to multiple ongoing engineering workstreams to improve future versions of Android through Facebook's experience. [nmontaperto, NA]

PRODUCT SUCCESS

- **GPP for apps**: Launched Google Play Points for apps in JP in deep collaboration with GPP team on 27 March. BDs and GPP team selected five apps from Comics and Entertainment categories such as Megapoke or Mirrati whose IAP consumer spends are high in the JP market. To maximize the impact of launch, featured Spring GPP campaign on Apps home [photo gallery]. Will expand GPP coverage in other apps categories after reviewing launch partners' performance. [JP]
- **Adobe Acrobat** implemented app bundles and dynamic delivery, and were able to reduce the app size by almost 30% [eblume]
- **StartApp SDK violation**: On Sept 27 2019, the International Digital Accountability Council flagged Google-certified SDK, StartApp, for allegedly sending users' information, and inferring their location without the proper disclosure. The SDK partner is now compliant and is currently being rolled out to over 74K apps. [ashrafh, mtt, edwinho]
- **Naver** implemented App Bundle & Dynamic Feature Delivery and shared early feedback regarding supporting versions below Kitkat and planning on using in-app updates as well. [KR]
- **Kakao Mobility** has decided to onboard to EAP of Project Watevra (efforts to provide a 3P application SDK for Android Auto - which will allow 3P applications's universal integration to AA) as AA's direction seems clear to support universal template instead of maintaining the exclusivity with Kakao Navi. [jlee, KR]
- Strong progress on the Image Quality effort with **Facebook** - Instagram has launched Camera 2 across Samsung S9/10 flagships and is expanding 1440p resolution experiments [nmontaperto, NA]
-

MARKET TRENDS, EVENTS, ISSUES

- **COVID-19 Impact on JP Apps**: DL increased overall in the end of Feb after government announcement of WFH/school cancel. **Entertainment, News, Music, and Health/Fitness the most. Comics, Shopping, and Education** to follow. Revenue is not positively impacted, and this is potentially due to free contents offered by developers. Detailed analysis here
 - **Comic partner interviews** for the impact: Summarized impact overview and feedback from comic partners (doc). Summary: (1) significant uplift in installs (2) flat revenue trend as most of the new users are enjoying free content (3) however, seeing increase in user engagement such as time spent and retention rate. Other common feedback was ROI improvement in ads spend due to the increased demands from users to search manga apps. [JP]
- Similar as DingTalk, ByteDance's Lark (enterprise IM and collaboration platform) pushed their global expansion forward, with all services free of charge until the end of the global pandemic. [cn, luli]
- **ByteDance** shared response to a recent Intercept article on their moderation guidelines. Please contact luli@ if you'd like to see their response. [luli, cn]
- **Galaxy Z Flip optimization opportunity for Photo & Music apps** - As part of efforts to provide innovative user experience through new form factors, the Korea team is working with the Samsung team to have meetings with major photo and music apps to discuss how to optimize apps on foldable phones based on Window Manager in Android Jetpack (Alpha). [jlee/hjhj, KR]
- Kunlun Tech Sells Grindr Majority Stake For \$608.5 Million [bbarras]

Commented [40]: +evankojima@google.com so curious to hear how this goes and how it might be applied to other Points markets, esp as a potential "carrot" for policy launch cc +daniellestein@google.com

Commented [41]: +rkatayama@google.com Rikako is now summarizing a postmortem doc after working with the GPP team for the initial 4 partners. Will include the carrot aspect in it too.

Commented [42]: +skaram@google.com is this the kind of content you want in the product success section? Adobe is working on a case study with us on the success of app bundles.

cc +maryliz@google.com

Commented [43]: that level of specificity is great, given their is a product outcome. I'd also suggest adding perhaps a separate bullet on the summit in general, highlighting the key themes covered and link to notes.

Commented [44]: It's up above in the first section

Commented [45]: Thank you!

Commented [46]: +jihyunc@google.com please add or edit on this subject :)
Assigned to Jihyun Chung

Commented [47]: Great to see! We've been working to have Tinder adopt Dynamic Delivery vs. investing in Tinder Lite so would love to see any feedback or best practices we can share.

Commented [48]: +skaram@google.com added this just now. sorry it's last minute!

Commented [49]: do you have any info / links on what the scale of that is? or links to docs with desired KPIs? thanks

Commented [50]: I can link the 3PIQ notes doc, if that helps? There's also email updates that go out to a sizable xfn group.

Play Apps BD Updates: February 2020

KEY UPDATES

- Tinder Lite has ramped to 100% globally [targeted by OS] to test engagement in emerging markets. We're currently working with Tinder on dynamic features to allow for the full app experience in these markets without having to segment their user base and offer a limited experience. They do not support monetization in their Lite app. [bbarras, dianagr]
- Microsoft Partnerships Team hosted Android & Play BD Platform Partnerships and Partner Developer Relations teams for an annual full day Android apps roadshow & feedback session. As an outcome, we identified joint opportunities for collaboration:
 - Enabling Cross-Platform Experiences, e.g. taking early work Microsoft has accomplished and creating official APIs at a platform level
 - Improving Microsoft App & Android Framework Performance through developer education, App Bundles, new APIs, and measurement capabilities
 - Creating innovative user experiences, such as dual-screen capabilities and integrations with Google first party services [eblume]
- Holistic discussion and exec sponsorship established on paths to drive higher Android stickiness and loyalty focused on camera quality & messaging between Facebook/ Instagram/ Messenger execs & Android Product/ BD execs. [kochikar, nmontaperto, maryliz, kamdar]

DEVELOPER SUCCESS

- Collaborated with Smule to build a comprehensive subscription pricing and tenure strategy for emerging markets, leveraging insights from Play data. [Smule rolled out tests in several markets, and reported a user LTV increase of +100% in Brazil and +50% in Mexico, a huge success. Tests ongoing in India now [samtolomei]
- Introduced business review (incl. 301, go global, affinity samples) to Naver Webtoon, and discussed on areas of improvement. Will conduct local device testing for ID, TH, and US to provide consultation on their high crash rate in the region [jihyunc]

PRODUCT SUCCESS

- Received executive support from ASAP & Ads leadership for Ads Abuse Disclosure Program (AADP). This program creates new avenues for third parties to report ad abuse issues directly to Google, helping us reduce ad fraud on Google Play. Completing partner onboarding with full launch expected by close of quarter [brookied, kyliem]
- Met with NYT subscription eng team along with DevRel and gained buy in to prioritize RTDN and Billing 2.0 in order to solve reporting issues and unlock future feature and surface adoption.
- Launched security partnership deal with Immunitant to improve vulnerabilities on Android at the code, foundational level to secure and enhance our infrastructure across the ecosystem. [lenakatib]

MARKET TRENDS, EVENTS, ISSUES

- Snap launched mental health intervention tool.

Commented [51]: +daniellestein@google.com +skaram@google.com FYI just updated this snippet around Smule price consultation, as I don't think these have been sent out yet for Feb.

Smule came back and told me based on my pricing consult, their tests resulted in a +100% increase in user LTV in Brazil and +50% in Mexico LTV :-). Great outcomes, wanted to highlight

Commented [52]: YASSSS! So pleased! What did they change? Maybe a #Playtalk on how to use current go global resources for apps?

Commented [53]: we reviewed their prices in various markets, and i highlighted that their prices in Mexico and Brazil were very low, even by local currency standards-- they raised their prices and saw a large increase in transaction value with limited impacted on conversion rate lowering.

StratOps is slated to still release the first batch of playhub pricing modules-- that might be a good time to highlight these wins, as this would be achievable with those pricing modules

Commented [54]: +1 this is awesome; i would suggest sharing a note to stratops (feel free to cc me) to try to make the case for prioritizing this getting into playhub soon

Commented [55]: +1 please share with Strat Ops and lets confirm that this is still slated to get into PlayHub soon

Commented [56]: just sent a note to stratops with oyu guys on cc

Commented [57]: Was the translation of all of that an ETA of mid/end Q2? I don't speak database/dashboard.

Commented [58]: I think so :(Candidly, I think that also means Q3, as this was originally slated for November.....

Commented [59]: Nov 2019*

- Attended RSA, SF's leading cybersecurity conference & hosted a series of partner meetings with Product leadership. Conference themes ranged from navigating new privacy legislation to realigning company org structures to address ever-evolving security needs [brooked]
- Attended Foxglove, Google's 1st ever privacy summit with representation from various PAs involved in security / privacy, see key takeaways here [brooked]
- SoundCloud raises \$76M from Pandora owner SiriusXM signaling a possible acquisition [bbarras, schroeer]
- Headspace raised \$93M, fueling their ambition to expand beyond meditation and into general wellness [samtolomei]
- Match Group promotes Shar Dubey to CEO [bbarras]
- Microsoft announces plans to bring Defender, their Windows antivirus solution to Android & iOS [brooked]
- Attended WW (fka WeightWatcher's) "Oprah 2020 Vision tour" in San Francisco with the WW c-suite. Discussing WW's plan to for re-brand and expansion into general wellness [samtolomei]
- Working with GRCN Team and Merch to launch a Coronavirus donation campaign where developers link from their apps to our campaign page go/play-youtube-covid19/list-of-developers participating in this campaign [mmai;luli]
- **ByteDance** launched a Search app for China domestic market, named 'TouTiao Search' (Toutiao = Headlines = the first news app that made ByteDance successful). [CN, luli]
- WHO has launched it's private channel on **TikTok**(screenshots). Within 3 days, WHO (ID:who) posted 3 videos, which have garnered 1.2 million likes and 168.1K followers. Meanwhile, **ByteDance** launched a new social musical streaming app Resso in IN in March. [CN, luli]
- China app downloads surge due to coronavirus outbreak since Chinese New Year. Top downloaded categories are education, entertainment, photo& video, business. [CN, luli]
- Due to the current Coronavirus circumstances, all Japan's schools are closed from March until their upcoming spring break. Popular education apps, Think! Think! and Aoi Zemi decided to provide their subscription-based service for free during this period for children's education. Jump+, our top Manga app also announced to unlock 10+ weekly magazine back issues for free in the app. [Japan]
- While Google Japan office is restricting external visitors in the office, presented "Improve your app quality to win the love of users" as a Play BD representative in an AppDev event, targeting 150 audience from large companies who are struggling to improve their app quality in a Livestreaming format [JP, rkatayama]
- Microsoft new Office (Union) App hit general availability. The app combines Word, Excel, and PPT into one app experience and is designed to be a mobile first experience [ebume]
-

Commented [60]: +skaram@google.com I don't know if this is a worthy update or not, so feel free to kill. The photo is just too good to not take my shot with though :)

Commented [61]: +samtolomei@google.com is this really you!??!

Commented [62]: I'm talking to Oprah about speaking at our next offsite

Commented [63]: omg.... please invite Oprah only when regional teams could travel!!

Commented [64]: Absolutely-- however, Oprah said she would only talk at our offsite on the condition that its not at Google office :-)

Commented [65]: That could be handled right? Thx for inviting her and getting her to commit for a talk. :)

Commented [66]: Lol @Sam

Play Apps BD Updates: January 2020

KEY UPDATES

- After almost 2 years of its launch in Brazil, Globoplay started their international expansion, targeting mainly the US. According to Globo's estimates, there's approximately 1.4 million Brazilians living in the US, that until now could only access Globo's content through Dish cable TV at a high cost. Globoplay

international subscription will cost USD 13.99 and will contribute to Globoplay's continuous growth. [carolsoler, LATAM]

- Hosted Snap in MTV for a xPA executive summit. Attendees included LCS, LPS, GCP, Android/Play, Search/Assistant, Hardware, and A/R teams. Building off of wins in Android and LPS in 2019, the summit was very well received by both Snap and Google execs. Summit overview [here](#) and Android/Play takeaways summarized [here](#). [nmontaperto, NA]

DEVELOPER SUCCESS

- [Headspace](#): Provided a comprehensive view of Headspace's performance in their key growth markets of France & Germany, Combined insights from LCS, TechOps reviews, GoGlobal reports and custom analyses to help Headspace fully understand the markets and provide recommendations to help them succeed. Well received by partner, and may serve as a template for future subscription developer GoGlobal presentations [samtolomei]
- [Saito](#): upcoming OTT TV provider in France confirmed technical launch in June with commitment to day&date Android TV and app support, including GPB integration. Dates for key interactions for Sabrina and LRAP agreement are currently in evaluation. xFN working group across LCS, PSS, Cloud, YT, Nest and Play working on partner success. [andrar]

PRODUCT SUCCESS

- ByteDance: in discussion with ByteDance on enrolling in the Google Play Security Reward Program (GPSRP). [luli, adambacchus]
- Woowa brothers: [Developer success story on accessibility improvement project](#) has been released. [llee, KR]
- [Channel Partnerships] [Fractal.ai](#) (an AI powered analytics company and a current active vendor with Google) agreed to assign a consultant to Google Play for 2 weeks. This consultant will collaborate closely with the Play Growth Consulting team in MTV to learn more about the challenges developers face from a user-churn perspective and accurately evaluate the scope and cost of building a Churn Prediction Tool and Re-engagement Strategy to power our GC tools. [cmaddipatla, ashrafh]
- Pandora has enabled AH and RTDN after 1+ year of working closely with their team on the integrations [bbarras, cartland]
- RTL (leading EMEA broadcaster group) has after 2+ years of negotiation provided a metadata feed for ATV (Sabrina) integrations and is committed to key feature developments. Furthermore, RTL is currently evaluating an LRAP agreement. [andrar]
- Large media group ProSieben is launching a premium audio/podcast service ("FYEO") in German language territories in Q2. Partner is interested in ADAP and evaluating the agreement. [andrar]

INDUSTRY / MARKET TRENDS, EVENTS & ISSUES

- Coming Soon to Tinder Dates: [Panic Buttons and Safety Check-Ins](#) [bbarras]
- [ChangGoo](#) 2020 Kickoff: ChangGoo program of 2020 has kicked off and Korea's xfn team had a meeting with government agencies. We secured \$8M from Google Play consumer marketing budget and planning to select 100 developers (including both apps and games) for a maximum \$300K funding per developer from the government. [hjh]
- As Project [Watevra](#) (efforts to provide a 3P application SDK for Android Auto - which will allow 3P applications's universal integration to AA) is planning to have public announcement in 2020 IO, KR BD

team had to deliver the message to Kakao Mobility team that previous Kakao Nav's integration to AA is not applicable for Watevra v1 due to feature limitation. Kakao Mobility understood the new product direction may not be the most favorable to them given status quo's exclusivity is no longer available. [ljllee,KR]

- Hyperconnect (Azar) is planning to launch a new subscription service in addition to the current subscription service. Key difference of the new subscription service is that it is targeting HVU with higher price points and additional exclusive features. As part of promotion, introductory pricing is implemented on new subscription service, but while testing the upgrade scenario (From old subs to new subs), the partner found that the introductory price does not apply. Product team diagnose a bug. [ljllee,KR]
- Many key apps and games titles are found missing from top charts again at the end of Jan - early Feb (since last incident back in Dec 2019). <http://b/148732856> [luli,global]
- According to CB insight, by Jan 30 2020, the world's top 10 unicorn includes 5 from China (ByteDance, Didi, Kuaishou - Kwai, DJI Innovations) with **ByteDance** ranked top 1 at USD 75Bn; others are 5 US companies and one from India. [luli]
- Anghami (music streaming app) has s

Play Apps BD Updates: December (will likely also send out a summary of 2019)

KEY UPDATES

- **Special Growth Consulting sessions to JP First Penguins:** Held 3hr special Growth Consulting sessions as a part of First Penguin strategy to Nikkei and Shueisha, with an objective to empower them from data perspective. The session targeted decision makers, covering following topics:
 - How to achieve Digital Transformation
 - Digital KPIs that app developers should look at
 - Opportunity analysis

The topic of Digital Transformation, especially how to refine organization, caught extra attention from both Nikkei/Shueisha and the session was very interactive although there were 20+ attendants in the session for Shueisha. Special thanks to Chetan from US GC team for his dedicated collaboration. [Deck for Nikkei](#), [Deck for Shueisha](#) [evankojima/rkatayama, JP]

LAUNCHES & LEARNINGS

●

INDUSTRY / MARKET TRENDS, EVENTS & ISSUES

- New trend in JP Manga (Comics) vertical to apply super hybrid model of IAP, Ads and Subscription. This month, 2 manga apps Sunday Webry and GANMA! started subs intro pricing campaign for the first time. As the subscription model in Manga grows by, Manga vertical is now in the top 5 subs spend category for JP Apps. [rkatayama, JP]

- Chinese handset makers **Huawei and Oppo have started engaging with Indian developers** with lucrative incentives under their global funds to build localized mobile services that can be offered with their smartphones in the country. Huawei's sub-brand Honor is in talks with 150 top apps in India to get them on its HMS or Huawei Media Services. [Media report here](#). [mayama, GRCN]

WHAT OUR PARTNERS ARE SAYING

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Play Apps BD Updates: November

KEY UPDATES

- Z Holdings (Yahoo! Japan) and LINE** confirmed merger agreement. Yahoo! Japan is the biggest search engine in Japan and has e-commerce and online banking subsidiaries. LINE is a dominant messaging app and is also popular in Southeast Asia and Taiwan.
 - Parent Companies
 - SoftBank for Yahoo! Japan
 - NAVER for LINE
 - Cooperation Areas
 - Artificial intelligence, search, advertising and payment and financial services
 - Competitors
 - Domestic: Rakuten, docomo
 - International: IT giants from US and China including Google
- GOV.BR**, the [official developer account](#) for Brazil's official Government apps with ~13M MAU, [announced](#) on Nov 25th the launch of [Student ID](#). Developed by the Ministry of Education, the app is the first big launch from GOV.BR since our joint partnership on Play, working with them to create a better user experience for citizens. Student ID makes the issuance of the ID completely digital and cost free to users! [carolsoler, LATAM]
- Project Bloom** - Samsung is pitching camera sdk for their new foldable device (Strictly confidential) targeting to launch H1 2020. Samsung's sdk will let developers on fold status (open, fold, half-fold) and developers are required to design UI accordingly. Samsung is expecting major camera apps to offer exclusive user experiences on Bloom device. Pitch scheduled for SNOW, Kakao and LINE in Korea. [hjhh, ljee, Korea]

LAUNCHES & LEARNINGS

- Globoplay**, the largest Subscription App in BR, reached a new revenue baseline in October: 1.5M USD - this represents +50% growth in just 2 months. After analyzing data the revenue and LCS investments, we can conclude that most of the revenue comes from organic traffic. Globoplay also implemented Real Time Developer Notification and Account Hold, after a year of study and development, that should also help revenues with churn improvement. [carolsoler, LATAM]
- Asuken**: After BD provided advice for Asuken, one of the biggest healthcare apps in JP, could offer better user experience by using Google Play Billing as the sole payment method on the app, they changed its

Commented [67]: +rhamma@google.com

Commented [68]: very interesting; is the app the same on iOS? how did we work with them on the launch?

Commented [69]: they have not launched yet on iOS. We have been partnering with the Brazilian Government via Google Policy and helping them to create a centralized page and a standard look and feel for all gov apps. It has been an amazing project with lots of benefits to the Brazilian user.

Commented [70]: +nmontaperto@google.com are you aware of this? cc +vinitmodi@google.com

Commented [71]: Yes. Samsung is shipping devices on Q which won't support their use case, so they are using an SDK to fill the gap. We jointly agree that platform support is ideal and the team is looking to prioritize for R. Currently working to have three way conversations with developers adopting the SDK to advise PM on how to best build the functionality into the platform. LMK if you want to chat for more details.

Commented [72]: @Nick - do you know if this is part of the Samsung camera SDK or a different Samsung SDK? I want to at least make sure that CameraX remains an option for Bloom for Samsung.

Commented [73]: +nmontaperto@google.com

Also can someone please explain why we are pitching this to devs if it's a Samsung SDK? cc +hjhh@google.com +ljlee@google.com +jihyunc@google.com

Commented [74]: We are not pitching. We are asked by Samsung to join the dev conversation to help Samsung gauge the workload.

Commented [75]: @Vinit, AFAIK, this Bloom sdk is not part of Samsung Camera SDK. This is a separate sdk.

Commented [76]: +hichristopher@google.com would be good to get confirmation from Samsung

Commented [77]: Hi - here is some background to this:
> Samsung's new vertical fold device "Bloom" has a unique mode which they call "Tent" mode, which allows the device to sit upright at an angle. They think there are some unique use cases for this, for example, vloggers to be able to broadcast while also giving another input area for the vloggers to type / interact with while broadcasting.

> Samsung's first preference is for the platform (Android) to build in these APIs as they know developers will not want to support multiple SDKs.

> Android Platform wants to build this in as well (and plans to) but we won't be able to meet Samsung's schedule, so in the interim, Samsung will use their own SDK. The plan is for align development efforts now (d...

introduction of subscription page and removed credit card or other payment methods from the page, making Google Play Billing as the sole payment method. Thanks to the change, its consumer spend on September jumped by +61% YoY. BD will offer growth consultation to accelerate its growth in the future. [Japan]

- **NBA Rakuten:** Rakuten launched a new SVOD streaming service app with Google Play Billing. It is the first time for Rakuten to integrate GPB. The app offers 3 different subscription plans, ranging from \$9.9 to \$26.5 per month. Rakuten closed a multi-year partnership with NBA in 2017, and Rakuten is the exclusive distribution partner in Japan for all live NBA games. The app content is dedicated to NBA stats, news and videos. [Japan]
- **Project Ally Creator Recommendations:** provided first-of-its kind YouTube creator recommendations for Google Play Marketing influencer campaigns with 5 game developers. Recommendations are driven by Play engagement data linked with YouTube viewership data. Working with StratOps to scale recommendations to app developers in Q4 [samtolomei]
- **PicsArt:** Delivered pricing recommendations to PicsArt for key markets, to improve their conversion rates. PicsArt will begin testing this week. [samtolomei]
- **Calm:** consulted on rollout of monthly subscription SKUs for emerging markets to improve conversion, along with recommended local price points. Testing to be carried out in December, with results shared back. [samtolomei]
- **iQiyi:** China's no.1 video streaming service provider launched a new International app (independent from their previous TW app), targeting global audience starting from SEA, HK, MO, US and CA, with localized UI and subtitles in 7 languages. iQiyi announced partnership with Malaysia's Astro (Astro Malaysia Holdings Berhad (Astro) is Malaysia's leading content and consumer company in the TV, OTT etc.) and will be providing exclusive local content for MY users. They are already on Play Billing with subscription. Working on solving their billing integration with DevRel, and lined up for Lunar New year campaign. [luli]
- **Samsung Music app integration to Android Auto** has finally completed. Samsung Music's integration to Android Auto has been discussed over last few years and approximately 47% of Android Auto users could not have extended experience on Samsung Music through Android Auto while most of major music apps (Spotify, AppleMusic, Amazon Music, etc.) are supporting the extended user experience. Through this integration, users now have a safe and seamless connected app experience while driving. [ljee, KR]
- **Azar** from Hyperconnect has launched async profile picture based matching service which has a lot similarities with Tinder's Swipe Right. This service is targeted to users who do not prefer real-time video match and North America is main market they would like to invest in 2020. [ljee, KR]
- **KKBOX** launched KK Points loyalty program. Users earn points from subscription and redeem points for concert/ event tickets [jenchan, TW]

Commented [78]: +evankojima@google.com this is great! are they adding english interface? looks like feedback on the app about this is very poor

Commented [79]: Thanks Sarah for pointing this out. They don't have an immediate plan, but we will be discussing more early next year how they can improve the overall user experience of the app.

INDUSTRY / MARKET TRENDS, EVENTS & ISSUES

- **Futuristic App Day** event was held on Nov 7th in collaboration with the Cloud team with a goal to inspire and educate Core/Ecosystem partners to find First/Second penguin candidates through sharing how future-oriented user experiences will be and how technology can help make solutions accessible. 70 people from 34 companies joined the event and left 4.4 DSAT. [Japan]
 - [Event Report](#) / [Event Website](#) / [Event Deck](#)
- **Android 10 Workshop** ([event report](#)) in Beijing & Shenzhen. Following the [Q Labs](#) in May, we hosted 67 top developers from 25 companies to address Q app compatibility issues post Q launch in the week of Nov. 11, 2020. [Presentations](#) with developer sharing and live Q&A delivered, 66% devs committed to migrate immediately and 30% devs plan to evaluate. All attendees will receive [Q migration guide](#) and [FAQs](#) collected. [mayama]

WHAT OUR PARTNERS ARE SAYING

- Met with **GoPay** in MTV to discuss opportunities for further partnership, including helping to broker in-app game & app item promotions to drive more monthly transacting users in Indonesia (and eventually in Philippines & Vietnam when they launch in 2020). Notes [gcharusa@, skaram@, mloew@, pfeng@, gtait@]
- Pairs (Match group): Had a meeting with VP of Pairs, one of the biggest dating apps in JP and a member of the Match group. Pairs has used both credit card payment and Google Play Billing on its app. During the executive meetings between Match and Pairs that happened in the week of 28 Oct., Pairs proposed again that they'd like to use GPB as the sole method of payment. However, the Match executives declined the proposal, so that we expect that Pairs will keep using both billing methods next year. While Pairs can control UI/UX of billing page, which is out of Match's control, BD suggested that Pairs should make Google Play Billing easier to find. In addition to Pairs, Match will increase investment into Tinder next year in JP; BD has a concern that other JP dating apps could have a perception that using Google Play Billing is not mandatory. [Japan]
- Met with CBO of **Hyperconnect** and had questioned about Tinder's billing case. Hyperconnect raised the concern that these exception cases are raising voices on unfair treatment of Play among other developers who are abided by Play billing policy and they are hoping for prompt action can be taken. [ljlee, KR]
- Met with CEO and growth lead of **CatchitPlay** - KR's top spending education app with language learning service - to discuss their next go global market after their recent launch in JP back in April. CatchitPlay is going to continuously invest in JP market penetration while experimenting beta launch to key SEA and US market. Deck [ljlee, KR]

Play Apps BD Updates: October

KEY UPDATES

- Hosted 1st **Bharti Airtel Group** Executive Summit for their CEO and entire senior leadership team in MTV on 23rd Oct. Highlights of Summit : Commitments & Closures, on projects that were in the pipeline or were new opportunities across PAs. Noteworthy for Play : PlayPass partnership and launch plans for India (aim for H1 2020) with Airtel as a distribution partner at launch. Briefs here [shalinipoddar@, shazam@, pfeng@]
- **Spotify** Has rolled out App Bundles but are not seeing improved performance, investigations into it have not led to results. Next step is meeting with PM at Playtime. [schroeer@]

LAUNCHES & LEARNINGS

- **Naver** experiences build latency on dynamic feature. Will launch DFM to service an audio feature on November 11th to their main app. They will extend the launch of dynamic feature to their other apps on Q1 2020. But wishes to speed up the build time on Android studio in order to more aggressively change to using dynamic features. [KR team]
- Woowa Brothers(Baemin) launched TikTok/Snap like service called **Thiing** with local AR technology targeting genZ. [KR team]
- Sway from LINE plus launched targeting MENA users.

- Partnered with Android Pixel 4 hardware team to ensure app success for 10 category partners by hosting hands-on pre-launch testing workshop in MTV on 10/8 to test Biometric API Implementation [lenakatib]
- **LIFULL HOME'S** is planning a full UI/UX renewal in a few months. BD and TechOps provided thorough UI/UX review working with Material Design team [Deck]. With this UI/UX renewal, LIFULL HOME'S aims to improve user engagement, especially by improving user navigation. [JP, rkatayama]

INDUSTRY / MARKET TRENDS, EVENTS & ISSUES

- TNK Factory SDK associated with click fraud issue causing 300+ apps to be immediately suspended from Play. GPP sent out push warning to users on click fraud and resulted in big app uninstall from impacted developers. TNK Factory is invested from Kakao Investment. Huge media coverage on Google Play as being too harsh for potential risk. BD team & BDOps actively involved in reinstate/appeals process of the impacted app and have escalated the issue with the malware detection team. The team will review the source code and make final decision by 4th week of October. [KR team]

WHAT OUR PARTNERS ARE SAYING

- Naver have published the new update of their Naver KnowledgeIN app using flutter and have experienced big ratings drop after the adoption. Seems like the keyboard support was the crucial issue to the problem. [KR team]
- KKBOX is asking for subsidy to onboard student plan onto Play billing this Q4. Looking to work with Play team to get budget for app partners [jenchan]
- Kakao asked if localization on policy related push messages could be more elaborative and better localized to minimize user confusion. For example, Kakao feels family policy message on console is reasonable when put in English, but translated version in Korea seems to imply that the app is "harmful" for children. And requested if Play will be willing to receive key developer feedback on policy messages. [KR team]
- The Google Play Billing account of **DAZN**, Top 5 subs dev globally by now, was offline for 3 days due to a suspension of their payments account. The account was taken down by payments compliance due to a failed verification of a new account holder DAZN had added. While it seems like compliance had not alternative in this case, DAZN very clearly stated their "unhappiness" with this process, given we neither gave them a heads up, nor any grace period at all. As we are working on the post mortem its very clear that this has substantially harmed DAZNs trust in GPB as a payments provider and we (as in the Play team) need to revise our payments center troubleshooting process to ensure we prevent this from happening again. [schroerer]

Subject: Play Apps BD Updates: Sept 16th - Sept 27th

KEY UPDATES

- **Headspace** saw a **58% increase in subscription conversions and 20% increase in subscription spend** during testing as a result of implementing pricing recommendations provided in a first-of-its-kind BD pricing consultation. Plans to rollout price changes globally in coming weeks. [samtolomei]
- **LATAM** team hosted the first Google Play Apps Partner Day in Brazil on September 25th. The event, focused on sustainable engagement and building a long term journey to increase users lifetime value, had over 80 developers and was rated 4.9/5. Full report to come. [carolsoler, mariareis, LATAM]

Commented [80]: +samtolomei@google.com wow, that's awesome!!

Commented [81]: Thanks! Slightly updated the wording, as these results are from tests, and are going to be rolled out in the future

- 1st **North American Sustainable Growth Forum** took place Wednesday in NYC. There were 25 attendees on-site along with 35 on the EMEA livestream. This was the first cross regional forum via live-stream exclusively for managed and HiPo developers. We held 7 sessions in total, 5 of which were Developers for Developers sessions and an SME workshop on retention. More to come with a full event report. [Recording of the event](#), and [agenda](#) [brianconnor, mauvergara]

LAUNCHES & LEARNINGS

- **iFood**, the largest food delivery in BR with over 10M installs, launched its first version with Google Sign-in. The version it's available on Play in Beta. iFood expect to reduce friction and improve overall conversions and will soon roll out the feature to all of their users. [carolsoler, LATAM]
- **LINE** started their cryptocurrency trading service "BITMAX" on Android first, tbd on iOS. Currently, five currencies including Bitcoin and Ripple are available. LINE's own cryptocurrency "LINK" is not available yet since they haven't got a government licence yet. The service is available in the "Wallet" tab in the LINE messenger app. We're syncing up with MTV to confirm our stance on Libra from Facebook. Caity (cdowney@) from the top partner management team suggested to reach out to bitcoin-legal-announce@google.com to advise on Google's overall cryptocurrency strategy. [Japan]
- **KKBOX** (top music streaming app in TW, HK) seeks collaboration with Google for Education to leverage Gsuite login to target student subscribers. If this works, their student plan will onboard Play billing subscription, estimating to bring 25K new subscribers in 4 months. [jenchan]
- **AU Health & Fitness Apps** : Ongoing pre-launch planning (subs strategy, pricing, churn etc) with 3 key H&F Subs Apps: [Keep it Cleaner](#) (Nov19), [Centr by Chris Hemsworth](#) (Dec19) & [TammyFit](#) (Oct19). Strong pre-launch demand with revenues of +\$1m/month expected [dyin]
- **Stan AU (POO)** on track for Q2'20 launch of Sabrina/Amati. Key global M&E partner. [dyin]
- **Canva AU** developing for Chromebooks with special Google promotion of \$100k capped funding for first 3 months free subs @ \$13 US. Expected Q4'19 launch [dyin]
- **Start on Android NZ** launched SOA NZ (A&G) at [NZGDC](#) with keynote [presentation](#) [dyin]
- **Subscription price change** is one of the hot topics among JP developers as the consumer tax will increase by 2% next month. 2 partners increased their subscription price with our mandatory price change feature. Summarized [key learnings/feedback](#) to share with the product team. [rkatayama, JP]
- Flagship **Runtastic** apps are now [adidas Running](#) and [adidas Training](#) as part of a brand alignment plan. Merch have supported adidas Running with 2 campaigns, one targeted to users without the app installed and one targeted to existing users, with the goal of complementing the partner's messaging to users. [jenif]

Commented [82]: +rchroma@google.com FYI

Commented [83]: +daniellestein@google.com
+samtolomei@google.com
+brianconnor@google.com +bbarras@google.com FYI

Commented [84]: You will definitely become our Price Change expert!

INDUSTRY / MARKET TRENDS, EVENTS & ISSUES

- **Naver** showed great interest in expanding more usage of Flutter to their services. Their [Naver Knowledge app](#) will soon be updated using all features from Flutter. KR team see more developers are showing interest in Flutter for their app development to improve efficiency and reduce cost associated with build time. Developers are wondering if Google will focus more on flutter or Jetpack capabilities for Android development. Would be interesting for Play team to have a business perspective on developer's engineering efficiency improvement. [KR]
- **Tinder** is receiving 1 star reviews in regards to their recent billing rollout. Users call out lack of transparency and control over managing their subs, further supporting Play's trust and safety narrative. Tinder also finished filming first [original television series](#) which they plan to make available via their app [bbarras]

- **Televisa, Blim and Azteca** C-level representatives (Mexico) attended the NYC M&E summit last week. They confirmed their will to prioritize the ATV requirements to prepare for Sabrina launch. We agreed on a plan to onboard and meet their respective CEOs in the coming weeks (dpons)
- **Human-Centered ML Summit**: DevRel held a 4-day tour in Tokyo holding a workshop, event and partner meetings. Topic covered People+AI guidebook and material design for AI. [JP]
- **Pinterest** was removed from the store the evening of 9/24 due to a PII collection disclosure violation. Quick action resulted in re-listing within 3 hours and minimal metric impact; Policy & BD teams working through how to prevent takedowns of sensitive managed partners moving forward [nmontaperto, NA]
- Multiple sport news and Daily Fantasy sports were given 7 Day notices due to policy violations. This was prevalent throughout the ecosystem but partners are in the process of unwinding the update. [brianoconnor]

WHAT OUR PARTNERS ARE SAYING

- **Tinder and NYTimes** both inquired about the implications of Apple's OAuth requirements. Tinder asked if Google plans to require developers to utilize Google Auth similar to Apple. Main concerns with Apple's requirement is they will no longer be able to access the user's email via Apple auth [bbarras, brianoconnor - NA]
- **ABA English** commented in this week's Q&A about their frustration with organic growth opportunities. While featuring gives a large boost in traffic, installs don't necessarily see the boost they had experienced before. Secondly, the team have been working hard on optimising the Play and App Store listing, but commented that they have seen a greater step change as a result on the App Store rather than Play. They asked for more guidance on ASO / listing optimization best practices and case studies. [jenif - EMEA]

Subject: Play Apps BD Updates: Sept 3rd - Sept 13th

KEY UPDATES

- Facebook (Facebook app, Messenger, Instagram) has opted into the Google Play Security Rewards Program. Facebook will publicly announce their participation in the program on 9/1 [brooked, jeenamerina]
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LAUNCHES & LEARNINGS

- **ATV** - Shared the past decks from JP with the global Product Specialist team so that they can use them as a template to summarize the landscapes of ATV in different regions/markets. [Japan]
 - Entertainment Industry in Japan
 - ATV Acceleration Fund - Japan Review 2018
- **LRAP w/ AbemaTV** - The first-ever LRAP case from Japan. tsotome@ shared the draft agreement doc with the developer last week. [Japan]

INDUSTRY / MARKET TRENDS, EVENTS & ISSUES

Commented [85]: +brooked@google.com
+jeenamerina@google.com Were there any discussion happened with GPSRP team before FB opt in? Anything different for FB from the other developers who signed up voluntarily themselves on Hackerone site?

Commented [86]: we had originally met with FB back in 2017 when the program first launched and they weren't interested in participation at the time. With the launch of GCVD (we help devs disclose bugs to any dev with 100M+ installs, regardless of whether or not they've opted into the program) we were able to re-start the discussion with FB as a bug was discovered in one of their main apps. This example helped them see the value in formally participating in the program, so they confirmed their participation

Commented [87]: Do we have a pitch deck for developers beyond what's on Hackerone.com? I am thinking to talk to ByteDance about this. Understood developers need to be committed to provide instant feedback to validate each researcher report.

Commented [88]: here's the current deck we have available (note we're working on making a version that's more dev friendly. adam and I are also happy to join your call if you want us to help pitch to ByteDance's security team.
https://docs.google.com/presentation/d/1GDsgMqpo84-QTNLWc_QNhILFQX5XQe-ZQIq0CSCH3jg/edit?usp=sharing

- Facebook's dating service is launching in the US [bbarras]
- **Naspers:** South African media conglomerate underwent corporate restructure. New public offering as 'Prosus' on Euronext stock exchange; becoming largest European consumer tech firm (by market cap) through partial ownership of Tencent, Mail.ru, OLX. Spinning out local Africa subsidiaries (Takealot, DsTV, Supersport) [ref] [iky, alonch]
- **JR East x Google MaaS** - Joined a 2-hour intensive One-Google design sprint to consider how JR East, the largest railroad company in Japan, can accelerate their mobility in collaboration with Google. [Japan]
 - Workshop deck, including notes on each team's presentations (P74-P76)
 - Trix with ideation notes - typed up notes from each team's memo sheets (in Japanese)
 - Workshop photos
- **KR Google Day for Kakao/Naver/Other cores**
 - Held Google Day for Kakao and Naver at their site to improve product adoption and understanding of Play products. The session was focused on app bundle/dynamic features update, app integrity, console metric refresh, AR/VR, Flutter, and Android 10 features. Both companies livestreamed the session and we reached 562 employees for Kakao, 141 employees for Naver. Hosted a mini session on App integrity/Console metric refresh inviting 16 core developers outside Kakao & Naver. [KR]

WHAT OUR PARTNERS ARE SAYING

